eRMA – KYVU's eLearning Resource Management Assistance

In the KYVU initiative, there are at least three interrelated online environments:
- The website, www.kyvu.org, where basic information is found, including help contact information for KYVU Call Center and 24/7 basic computer help.
- The KY Virtual eLearning Portal and ANGEL course management system where you and your students can craft online communication environments (coordinators can create courses or groups, and students can create informal groups in ANGEL).
- eRMA, the KYVU eLearning Resource Management Assistance software, which holds the course enrollment information as well as learner demographic information for authorized users to access, edit or pull reports.

KYVU's eRMA supports online registration, single-sign-on to multiple systems, course catalog displays, management of learners' and instructors' enrollment information, and report generation. Some KYVU providers may have more environments than above, depending on their contractual arrangements with the KYVU. eRMA integrates our course management systems (ANGEL, WebCT) and online products (PLATO, WIN, LiteracyLink, Learning to Teach With Technology) with our Kentucky Virtual eLearning Portal.

Each KYVU provider's instructors and coordinator can create or edit any new programs, courses or user accounts in ANGEL they want. (If the provider wishes to create separate sub-providers in order to help organize how their users are enrolled, please call the Call Center to make this request.) eRMA primarily works to display course and program offerings on the KYVU websites, provide course-specific types of registration (including eCommerce), enroll and dis-enroll learners and staff, allow access to the portal, and to pull regular and customizable reports for authenticated users.

There are two basic profiles of authenticated users who can access eRMA: instructor and coordinator. Each provider determines who has which profile. This document serves as an orientation to these two profiles, and we encourage you keep in touch with the KYVU Call Center staff as you and your colleagues work in eRMA.

Common Tasks for Instructor in eRMA

Manage Courses
- Create a Course and Course Section
    - Determine course ID and correct course management system used

    - Enter Course Description, including the following:

        a) course status is to be set to:
        - Active = message to Call Center to display the course on website once a section is opened. Courses with *"active"* status along with *"open"* section status and *"display"* box checked allow for online registration. **NOTE:** if the section is "closed" but the course "active" then the course information will display but not allow online registration.
        - Inactive = message to Call Center not to set the open section to display on the website for information or enrollment purposes (e.g., a DEV course shell)

- Under Revision = message to Call Center and KYVU Coordinator that the instructor is still working on this course description.

b) co-requisite with another course (this means the new course will be placed in the registrant's EduCart if the other course is chosen)

c) term setting
- Virtual, if no academic credit is associated with it (usage based on fiscal year)
- current and future semester terms: these settings are used for our providers who offer academic credit for their online courses; this setting allows you to gather your learner reports in eRMA based on specific semester terms; students enrolling in courses from our "Academic" providers will be placed automatically into a "pending" mode and by the end of the semester term the course is "closed" by the Call Center; since this does not change the student's enrollment status the course remains on his/her portal until 2 semesters have passed – at which time the course is removed from the KYVU server. **NOTE:** the Call Center staff requests that our providers who identified as "Agencies" or "Continuing Education" provider types NOT use these academic term settings.

NOTE: If you have course descriptions or course sections already filled out, and you simply want to start a new one with a few differences from a previous one, use the "Clone this Course" or "Clone this Section" feature. In the Course List area, click on the course title you want to use as a template for a template and choose "Clone this Course." Or, if you wish to use one of your sections as a template for new one for that particular course, choose "View Sections" in the Course List area and then "Clone this Section."

- Submit to Coordinator for approval before being sent to KYVU Call Center for display. Upon receipt of an auto-email, the coordinator then reviews the section and chooses to "Approve" or "Return for Revision". Once the section is approved by the coordinator, the status shows "Sent to KYVU;" and once the KYVU Call Center reviews all required course fields for completion, the section status should show "Open."

- Create a Group
This functionality is useful when you want to create a courseID for a Group in ANGEL so that it can serve as a co-requisite for other courses and thereby gather a unified roster of your registrants for recruiting or retention communication purposes.
- Follow the same steps as creating a course, and don't forget to create a section (the instructor area should remain blank since eRMA cannot yet insert the instructor into an ANGEL group)
- Create a Group in ANGEL – you will find this option under the nugget "Community Groups" – and name it the same as in eRMA. Enter your newly created Group and click on the "Tools" tab. Find "General Group Settings" under the Group Settings nugget, and copy the SectionID – it should look something like this "GROUP-040123-124037-GAR." Send an email with this unique SectionID to

the KYVU Call Center <kyvu@kyvu.org> requesting that your new group be tied to the eRMA CourseID you created in the first step of this process.

- Edit Course and Section Descriptions
  Once the course is approved by the Coordinator and a section created – before the section is opened (i.e., the coordinator submits it to KYVU), the instructor needs to
      o associate the course with a particular program
      o add instructors to the correct sections

      Course and Section Settings
      - Active = KYVU Call Center should display the course section on the website
      - Inactive = the course will not be displayed for online search or registration
      - Cancel = section not offered for some reason but not to be deleted
      - Close = the course (if active) will show up on the website but not allow registrations
      - Delete = KYVU should get rid of the course shell from the CMS (the class tally and
            related student enrollment information remains in eRMA for reporting purposes)
      - Pending = not ready for information to be displayed
      - Return for revision = KYVU Call Center or Provider Coordinator noticed that a
            particular description field was not filled in
      - Submit to KYVU = KYVU Call Center needs to create a course shell -- or, if course
            setting is "Active," display the course description on the website because the
            course shell now has content in it and is ready for enrollment

Manage Learners
- Create New Accounts, inc. guest accounts
- Change Learner Enrollment Status
      The following statuses do not appear in KYVU headcounts:
      - Administrative drop = dropped for non-payment
      - Cancelled by provider = student had been enrolled in a class roster that was
            cancelled before the course started, e.g., minimum enrollees count not attained
      - Denied by provider = class is closed or student can't get in because
            he/she did not meet course requirements
      - Did not enroll = an error in recording request for registration for a particular course
      - Pending = KYVU call center is waiting to hear from provider to enroll student OR
            student's eCommerce transaction is incomplete
      The following statuses are included in KYVU headcounts:
      - Enrolled = provider requirements met and request for enrollment is allowed
      - Withdrawn = enrolled but did not attain completion of course requirements
      - Completed = enrolled student of a PD course completed course requirements
- Verifying demographic and enrollment data
- Running reports re enrollment status of selected learners

Manage Reports
- Class Tally/Rosters (searching all registrations and enrollment information for your learners), e.g., if you want a quick look at enrollment statuses in a particular course

- Learner Enrollment Reports (searching across all rosters and all registration demographic information for strategic reporting purposes), e.g., if you want to know how many registrants from a particular county registered for a particular course in a certain time period, you would:
  - *show* last,first name
  - *filter* mailing county
  - *filter* host provider (if needed, since some providers have multiple sub-providers)
  - *filter and show* course information
  - *filter and show* enrollment status
  - *filter and show* last enrollment update (to get enrollments within 2 given dates)
- Course Details Report – if you want a quick look at the number of your courses with specific course or section identifiers, such as:
  - similar course status, e.g., Pending, Active, Deleted, Inactive, Open, Sent to KYVU
  - all courses offered by the provider (or by sub-provider) by term
  - all courses offered by the provider (or by sub-provider) by program

Common Tasks for Coordinator in eRMA

All of the above but also can "Submit to KYVU" when approving the information entered by an instructor. In addition, the coordinator has the ability to do the following:

Manage Programs
- Create and edit Program Information so to bundle the courses appropriately in the KYVU website for online catalog viewing and registration (if appropriate)

Manage Instructors
- Create new instructor accounts (need the first/last name and email address – can also tie the instructor account to a previous learner account or craft learner account from this instructor account) and set particular roles in eRMA:
    - coordinator = can update programs, courses, instructors, learners, can query for an read reports
    - sub-provider coordinator = all of the above for his/her particular sub-provider environment only
    - instructor = read-only rights for programs, learners and reports, can update courses
- Deactivate roles if a particular account has more than one role
- Delete accounts (if an instructor account is tied to a learner account, then both are deleted); NOTE: if the instructor is associated with more than one provider, then his/her account will not be deleted until the KYVU Call Center confirms that the other provider also requires that this account be deleted.

Manage Courses
While the coordinator can create and edit courses as described above, the coordinator's unique role is to review submissions by the instructor and then:
- approve the information by selecting "Submit to KYVU" in the bottom drop-down box
- edit the information and then select "Submit to KYVU"
- return the course or section to the instructor for revision

As you work with the KYVU Call Center to set up your courses for
- development (never to show on the website or to allow student enrollment)
- enrollment from eRMA only (you can choose to display the course description on the KYVU website or not – either way, the online self-registration for the course is not allowed)
- enrollment by the KYVU EduCart and from eRMA (you can use the KYVU eCommerce functionality by contacting Norma Northern, KYVU Interim CEO, to get your account set up)

keep in mind the following descriptions for each of your course sections. There are four combinations in reference to "Display" and "Open:"
- ❖ Display box checked by KYVU Call Center + "Open" = section is displayed on the KYVU website and available for online registration via the KYVU EduCart
- ❖ Display box not checked + "Closed" = section not to be displayed and not available for online registration
- ❖ Display box not checked + "Open" = section not to be displayed and not available for online registration; enrollment is allowed only via eRMA by authenticated provider users

❖ Display box checked + "Closed" = section information to be displayed on the KYVU Website for informational (e.g., marketing) purposes only and not available for online self-registration.

Also, keep in mind that the KYVU has three Provider Types. Each of our providers have been defined by one of these provider types, however any provider may choose to identify a particular course offered as a different provider type depending on their needs. The three Provider Types are:

❖ **Academic:** for academic institutions who want the automatic "pending" mode for all registrants and for their courses to be removed by the end of two semester terms. NOTE: The Call Center will close the course by the end of a particular semester's enrollment period, however this does not change the students' enrollment status – they either stay in "pending" or "enrolled" mode in eRMA – and for the successfully enrolled student this means that – unless the teacher hides the course from within the ANGEL environment – the course remains on their portals until the requisite two semesters have passed. The KYVU will send a list of courses designated to be purged to the provider's KYVU Coordinator at the beginning of spring and fall semesters. The provider KYVU Coordinator will notify instructors that they have a three-week grace period to archive those courses. The purging of courses from the CMS servers should occur approximately one month after the beginning of the spring or fall term to allow for system usage to subside from the usual peak it experiences at the beginning of the term. It is the responsibility of the provider to send all updates of student enrollment statuses to the KYVU Call Center. This means that by the end of the term, the class rosters should include only the following statuses:
  o Administrative drop
  o Cancelled by provider
  o Denied by provider
  o Did not enroll
  o Enrolled
  o Withdrawn

❖ **Continuing Education:** for academic institutions offering CEUs in a fiscal year and who do not wish to utilize the normal KYVU interfaces for enrollment and update purposes, e.g., because they are using the KYVU EduCart eCommerce feature and wish to allow successful registrants to gain immediate access to the course material for which they paid. This bypasses the normal "pending" status that is usually placed on academic providers' students requesting registration. Courses/groups not associated with learners are to be assessed by the providers as to whether or not to be retained in database. KYVU will send a list of courses/groups designated to be purged to the provider's KYVU Coordinator on June 1 of each year. Those not explicitly requested to be retained will be purged by the end of each fiscal year (i.e., by June 30). The provider's KYVU Coordinator will notify instructors that they have a three-week grace period to archive any course or group flagged for purging. It is the provider's responsibility to maintain integrity in enrollment. This means that by June 30), all rosters for Continuing Education providers will include only the following statuses:
  o Completed
  o Withdrawn

o DNE (Did Not Enroll)

❖ **Agencies**: for those KYVU partners who are utilizing KYVU infrastructure and services and their courses fall outside traditional academic terms. The courses from this provider type will always be associated with the "Virtual" term. Courses/groups not associated with learners are to be assessed by the providers as to whether or not to be retained in database. KYVU will send a list of courses/groups designated to be purged to the provider's KYVU Coordinator on June 1 of each year. Those not explicitly requested to be retained will be purged by the end of each fiscal year (June 30). The provider's KYVU Coordinator will notify instructors that they have a three-week grace period to archive any course or group flagged for purging. It is the provider's responsibility to maintain integrity in enrollment. This means that by the end of each fiscal year (i.e., by June 30), all rosters for Agency providers will include only the following statuses:
  o Completed
  o Withdrawn
  o DNE (Did Not Enroll)